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ABSTRACT

This paper presents a planned, goal oriented, skill building, in-service training program that is based on district goals. The participants are professionals, chosen by local school districts, who train teachers, aides, parents, and volunteers in the use of the Primary Education Project/Individually Prescribed Instruction systems. The report contains a short description of the Learning Research and Development Center, Project Follow Through, and a K-3 program designed for children eligible under poverty guidelines. The paper emphasizes the organization and implementation process used in the project and analyzes those parts of the process that seem to have the widest applicability for other settings. An in-service training workshop helps an in-service professional become familiar enough with the system to train participants with little supervision. The workshops are based on district goals, self-selection of skills, cooperation with consultant staff members, and continuous evaluation. Diagrams in the report show the organizational structure of the project, the general schedule of the workshop, and activities offered during individual prescription time. (BRB)

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PLANNING AND CONDUCTING INDIVIDUALIZED INSERVICE WORKSHOPS

A REPORT ON A PROCESS*

by

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*This paper was initiated by a suggestion of Warren Shepler, Director Project Follow Through L.R.D.C. University of Pittsburgh. The authors, at the time of the original writing were all members of the Project Follow Through program development staff.

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A carefully planned inservice workshop offers a major potential source of new ideas and skills for the professional staff of a school district. This potential is too seldom realized because many district administrators and supervisory personnel need additional skills to plan and conduct good inservice teacher training. They also need additional help in integrating that inservice training with ongoing supervision. This integration is necessary to increase the rate of movement toward long range goals of the district's educational program. The ultimate purpose of well planned, goal oriented, skill building inservice training is this change of program and organization toward district goals. If accountability and demonstrated progress toward district goals are to be more than words at budget time, district personnel must use inservice training to produce these changes.

If this report succeeds in its purposes, readers should, after a complete study of it, be able to:

a. clearly and accurately describe the process explained here;

b. suggest applications and adaptations of the process for their schools; and

c. plan their applications and adaptations of the process.

The report includes a) a short description of the Learning Research and Development Center, Project Follow Through staff and its training program, and b) a detailed description of the inservice training organization and implementation process and an analysis of the parts of the process which seem to have the widest applicability for other settings.

A. L.R.D.C. Project Follow Through -- Staff and Training Program

Follow Through is an Office of Education-funded, kindergarten through third grade program, aimed at poverty guideline eligible children. There are at present 20 different Follow Through models. The L.R.D.C. Project Follow Through is developing a training and dissemination model for the Primary Education Project (P.E.P.) and the Individually Prescribed Instruction (I.P.I.) early and later childhood curricula and classroom management systems. Eligible sites have selected this model from the 20 available.

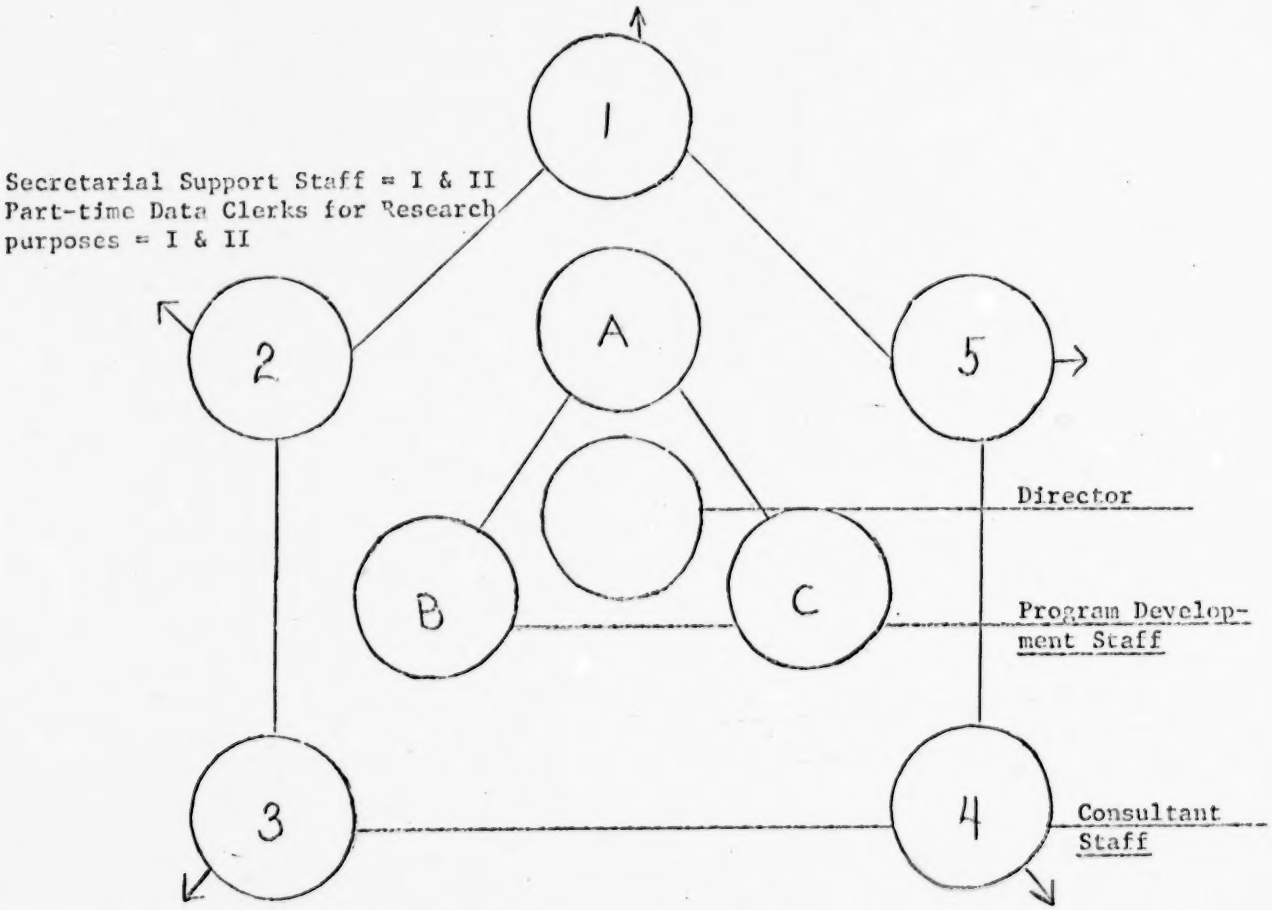
L.R.D.C. Follow Through has built its dissemination and training efforts around the efforts of on-site persons called Educational Specialists. These professionals, chosen by their school districts, must in a short time learn a new curriculum, a classroom management system, and the skills for teaching and assessing that system while they are performing on the job. Their training, as is that of teachers and aides, is carried out via short intensive workshops. Specifically, the Educational Specialist must train teachers, aides, parents, and volunteers in the correct use of each of the components of the PEP/IPI system. Each Educational Specialist has responsibility for six teacher-aide classroom teams. Typically, the Educational Specialist has been a teacher without special training in supervision, but with special potential, before appointment to this role.

An understanding of the L.R.D.C. Project Follow Through staff organization is necessary before the inservice training process becomes clear. This organization, not unlike that of a school district, is organized as pictured below in Diagram I.

The director and A,B,C (the authors of this report) constitute the program development staff. They share responsibility for total development of a dissemination and training model for the Follow Through curriculum. Each also holds some special expertise within the total curriculum model. Numbers 1,2,3,4,5

are called consultant staff. They have two roles. Each person on the consultant staff is a direct consultant to one of the L.R.D.C. Follow Through sites serviced by the center. (This number is limited because the mission of the project is to develop a training and dissemination model. As this model becomes a reality, other organizations will use it to disseminate this, and, with adaptation, other curricula). The second role of each consultant is to become the major staff resource person in one aspect of the curriculum or classroom management system.

DIAGRAM I



For example, one consultant, in addition to servicing a rural Appalachian school district is becoming the project's "expert" on materials production in the curriculum; another consults with a large inner city system while becoming the staff "expert" in the use of educational media with PEP/IPI Follow Through.

Within a short period of time (six to eight months after appointment) the Director and the Educational Specialists in each site must, with continuing support from the L.R.D.C. consultant staff, take responsibility for the operation and maintenance of their site. This means that they must identify training needs, then plan and carry out most inservice and supervisory programs in their school site.

Initially, the Educational Specialists participate in on-site training workshops with their teachers and aides before the school year begins. These workshops constitute an initial exposure for all members of the school staff to details of curriculum and classroom management in the model.

While some time is set aside for special training of the Educational Specialists during these workshops, they usually participate as if they were teachers. The workshops are planned by the center staff, with some inputs by the site project director (usually an Educational Specialist with a smaller teacher load) and the Educational Specialists. They are carried out under the direction of the project consultant who calls on the program development staff and the other project consultants as their various specialties are needed.

As soon as school starts in September and each site is operating so that pupils are learning, the Educational Specialists from each site

come to the Center for two different week-long training workshops. These are spaced about a month apart. These L.R.D.C. workshops, accompanied by a limited number of site consultancy days provided by the consultant staff and others, constitute the training program of the Educational Specialists.

This report is a description of the planning and implementation of the L.R.D.C. training workshops scheduled during the school year.

B. The Inservice Training Organization and Implementation Process

Specific Objectives for the Inservice Training Workshops

1. The workshop must help the Educational Specialists learn enough about the various aspects of the PEP/IPI curriculum and classroom management system to successfully teach others to initiate, operate, and maintain these aspects in their home sites, with only occasional outside help.

2. The workshops must exemplify the flexibility, the planning, the evaluation, and the individual variation which L.R.D.C. Follow Through is trying to implement both in the PEP/IPI curriculum model and in training workshops on-site.

3. The workshops must involve the Educational Specialists in the pre-assessment, planning, and evaluation of their own learning experiences.

4. The workshops must build a sense of participation in a larger effort.

Using these objectives as a base, the following planning process was used for the first workshop.

The Planning Process

1. The L.R.D.C. project director scheduled the workshops in consultation with the local site directors.

2. Each member of the consultant staff contacted all the Educational Specialists in an on-site visit and by telephone to elicit training needs and to set priorities.

3. Summaries of the needs for each Educational Specialist were prepared and shared with the total staff. These summaries included the staff member's own thinking and recommendations as well as elicited needs.

4. Each member of the total staff was asked to circulate a list of the topics for which he felt competent to lead training experiences.

5. The program development staff, acting as a facilitating committee, suggested a general design framework for the first workshop.

6. One week before the beginning of the first workshop, the total staff met to decide on the final design. The design was frozen at the conslusion of this series of meetings after careful consideration of the various site needs and the staff's training capabilities.

7. Individuals and small groups (2-3) of the staff volunteered to prepare specific objectives, a training design based on those objectives, and an evaluation model for each experience offered during the workshops.

8. After circulating each of these plans, the total staff met and critiqued each separate sequence of objectives together with the indicated training experiences and evaluation plans.

9. Revisions were made and final copies of the materials were prepared and assembled for each experience planned. A folder containing all these materials was made for each participant.

10. A final total staff meeting resulted in a design for scheduling all the activities to be offered during each time period available.

11. Each staff member reviewed his commitments for the workshop.

The Scheduling Process for Participants

Diagrams II-A & B display the two schedule sheets given to each participant for this first workshop. A detailed explanation of these schedule sheets follows the diagrams. (The specific activities listed on the diagram are

unimportant to the reader. The process of organizing our instruction is the important idea here.)

DIAGRAM II-A

GENERAL SCHEDULES

A.M.	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
9:00-12:00	Micro-Communications Workshop	Individual Prescriptions	Individual Prescriptions	Individual Prescriptions	Team Projects A. Produce Video-Tape B. Write Contracts
	12:00-1:00 P.M.	LUNCH----------	----------	----------	Joint Eval. as a group
1:00-2:30	Discussion of New Supervisory Program	Individual Prescriptions	Group Presentation by Center Staff Member	Individual Prescription	
2:30-3:30	Explanation of structure of week's workshop. Planning and writing individual learning activities for Tues, Wed, and Thurs.				
3:30-4:00 P.M.	Evaluation in team groups ----------				
8:00 P.M.	Social Party				

DIAGRAM II-B

ACTIVITIES OFFERED DURING INDIVIDUAL PRESCRIPTION TIMES

	TUESDAY	WEDNESDAY	THURSDAY
A.M. 9:00-12:00	1a - F.F. 2 - B.N.,W.D. 3a - P.H. 4 - D.C.,R.G. 5 - Staff	1a - W.D. 1b - R.G. 1c - W.S. 3a - P.H. 5 - Staff	1c - D.C. 4 - R.G. 3c - W.J. 5 - Staff
P.M. 1:00-3:30	1a - F.F. 1b - R.G. 2 - B.N.,W.D. 3b - P.H. 5 - Staff	1b - F.F. 1c - D.C. 3b - W.S. 4 - R.G. 5 - Staff	1-3 P.M. Group presentation All participants 3-3:30 Team Evaluation

Code for Activities Offered in the Above Schedule

1a - the traveling teacher slide training program
1b - the traveling teacher classroom observation visitation and video tapes
1c - the traveling teacher supervisory conferences simulation
2 - IPI math diagnosis and prescriptions
3a - materials production - behavioral objectives
3b - materials production - program sequence
3c - materials production - task analysis and box design
4 - parent involvement rationale, design, and roles
5 - participant free choice

Pre-tests were constructed for those activities which were part of a sequence. Participants could test out of all or part of a sequence if they could pass the pre-tests.

Those letters listed after each activity are the initials of those staff members who were organizing that training session. Participants used this information to ask questions about the session.

Explanation of the Workshop Schedule and the Participant's Selection System

Monday A.M. the first day of the workshop consisted of an interpersonal communications micro-laboratory. The objectives were bond-building among all workshop members, including project staff, and an assessment of the communication patterns of all participants.

The early P.M. explained the total supervisory program to be used in the L.R.D.C. Follow Through model.

At 2:30 on Monday, each staff person who had prepared an activity explained it by talking the group through the objectives. Each participant had descriptions of each of these activities in his folder. The structure of the remaining portions of the workshop were explained to the group. Each participant knew what activities were available, at what times, what the prerequisites were, what staff were available for each time slot, etc. Other consultant help was offered if participants had high-priority needs not listed on the schedule. Activity five, listed in each time slot, provided time and staff for these unanticipated needs.

The participants from each site then gathered separately with their own consultant staff members. Their task as a team was to write their own learning prescriptions for their total team, and then for each individual on that team. Operating with the program development staff available as needed for any group, this task (with option for changes later if they were needed) was completed. Each participant was able to schedule any of the activities he desired with the understanding that certain ones were sequenced. If any participant felt he could pre-test out of the initial sets of experiences in any activity, he was allowed to do so. For instance,

the initial experiences in the materials production sequence involved identifying and selecting appropriate educational objectives. Several Educational Specialists pre-tested out of this set of experiences.

The schedule was designed so that any given team from a specific site could work in all the major aspects of the curriculum and the classroom management system. Two of the three teams decided to stay with the same experiences so that they could share their learnings among themselves for more complete mastery of that topic. Their reasoning was that they could pick up the other topics at the succeeding workshops. During each of the time periods for the individual prescriptions we offered "5 - free choice." The individuals who chose this had a special interest not satisfied by the choices we had prepared. They made a separate contract with the staff member who was free during that time slot. That evening each staff member contacted for a "5" activity prepared experiences with those invividuals which would meet their needs. If the appropriate staff member was free only during a restricted time period, the individual Educational Specialist could build his schedule around this restriction or he could choose to pick up the desired competency by on-site training with his program consultant. His third choice was to have the program consultant secure the services of the desired member of the program staff for an on-site visit.

Each day concluded with team groups sharing ideas together while filling out their daily written evaluation. A party was scheduled on the evening before the final day of the workshop. All of the participants and most of the program staff were present. The objectives here are obvious: team building and cross-team support and sharing were enhanced by this activity.

Friday was both an evaluation day for the total program staff, and a team building day. Each team group with its project consultant was given two tasks:

(1) they were to prepare and tape a 10-15 minute video tape recording summarizing what they had learned during the week, and discussing what they had yet to learn, and

(2) each member of the team was to commit himself in writing to an individual learning contract for his and the team's self study during the time between the two workshops.

The contract was to include evaluation procedures. It was also intended to secure commitments from the Center staff for necessary resources. This last day's activity necessitated the teams' meeting and planning joint activities meant to provide a transition and hoped for transfer of behavior from the isolated training settings to the real, sometimes complicated back-home situations.

The final activity of this workshop was again a formal evaluation, but this time as a total group. Information on the contracts was exchanged among the teams as a way to get the team to share commitments publicly.

Evaluation of the Workshop

The ultimate evaluation of the first weeks' workshop has to be based on the ability of each Educational Specialist to use the training in his back home site. The proximate evaluation design included a daily written reaction sheet from each participant, a team sharing of ideas with their site consultant during the writing of the daily reaction paper, observation of staff members, and the products of the final team activities on Friday of the workshop. In addition, each activity was evaluated against its specific goals. These evaluations, phone conversations, and site visits by the consultants produced the following analysis.

Analysis of the Process and Problems

1. Very few of the Educational Specialists had ever had experience in planning and evaluating their own learning. Most Educational Specialists signed up for too many activities. They generally did not leave

a morning or afternoon unscheduled to quietly absorb and organize their prior learnings. If something was available-they took it. Thus, by Wednesday or Thursday many of the Educational Specialists felt overwhelmed -- mostly with their present state of inadequacy in the face of all the things they "know" they needed to know immediately.

2. Several Educational Specialists felt that they had not mastered each skill they were trying to learn. They were not sure they had developed capabilities to teach the skill to others when they returned to their sites.

3. Almost all the Educational Specialists mentioned their acceptance of the process of self-selection of their needs although they generally expressed some initial discomfort at making their own choices. They were also very acceptant of the idea of being actively involved in the training workshops they had planned for their teachers in their home sites.

4. We probably assumed too high a level of sophistication on the part of the Educational Specialists in expecting them to have the skills of managing their own learning. We did not exert enough leadership in teaching these skills. We also allowed each specialist to over-schedule himself. This in itself may have been a valuable learning experience for the Educational Specialist.

5. We were satisfied, however, that the process we used and the activities we planned had been appropriate and useful for the Educational Specialist.

Continuing Evaluation and Planning for Second Workshop

Phase I: During the interim month between the two workshops, regular telephone contact was maintained with the Educational Specialists by the individual program consultants. Each consultant also made at least one site visit. The purposes of this site visit were:

1. To reinforce the learning from the previous workshop.
2. To provide on-site training in support of the individual learning contract made by each Educational Specialist.
3. To do an on-site evaluation of the workshop training already implemented.
4. To begin planning for the second week-long training workshop.

Since our major objective is to make the Educational Specialist responsible for planning and evaluating his own learning, we wanted to be sure that each one had responsibility in planning for the second workshop. Therefore, each site consultant developed an individual series of activities which each Educational Specialist felt he needed.

These individual needs were ordered in a list of priorities. All of these activities were developed and ordered jointly for the total site with the site project director.

Phase II - One week before the second workshop, the staff met to compare notes. Where shared needs developed, common activities were planned. Again, resources, both physical and human, were located and committed. This time the process showed an obvious progression in the direction of individual and site autonomy. The learning prescriptions were written prior to the workshop in extended negotiations with the individuals and teams of Educational Specialists, project directors, and center consultants. The Educational Specialists were encouraged to identify their needs by several means:

a. They developed a list of needs of the teachers for whom they were responsible. From this list they extrapolated their own training needs.

b. In consultation with other Educational Specialists on their site, each Educational Specialist selected some skills or knowledge areas which he would develop as the site specialist in that area.

c. With the site consultant they developed some observation and analysis schema for evaluation of their skills in various aspects of their role.

The individual contract from the previous workshop was examined and evaluated. Further steps were planned on the basis of this evaluation.

Based on this total process, the second workshop developed even more variety among individual participants. Not surprisingly, Educational Specialists and the site consultants decided together in several of the sites that a workshop beginning on site, with some assessment procedures and training experiences in the real setting, and then adjournment to the Center (the isolated laboratory) for continued in-depth analysis, training, and evaluation of learning, made more sense than a total lab-simulated training experience. This thinking was encouraged by the staff.

The Educational Specialists from one site, for example, spent the first three days of the workshop on-site collecting observational data on all their teachers' classroom performance. When they came to the Center, they developed with the staff an analysis of each teacher's strengths and weaknesses in using the PEP/IPI curriculum and management system. Then each Educational Specialist role-played supervisory conferences with their site consultant. A member of the program development staff acted as observer and feedback agent regarding the content and process of the conferences. The project consultant for this site committed him to visiting the site on a follow-up basis to help the Educational Specialists evaluate their progress and plan further experiences.

Summary of Changes in Planning and Implementation of the Second Workshop

An overview of the experiences planned by the Educational Specialists for their second workshop reveals several changes from the first week:

a. Most Educational Specialists concentrated on fewer activities, and worked on them at greater depth.

b. The Educational Specialists took more responsibility for their own planning. They came with focused needs and wanted specific help.

c. The Educational Specialists were more confident in attempting try-outs of specific behaviors they needed for their back-home performance.

d. Two groups of Educational Specialists wanted specific help in one particular area beyond what was originally considered the Center's domain. They requested help in building a school-community liason program that would increase community acceptance and understanding of the program. They needed to learn how to work with formal and informal power structures. In short, they wanted and got help in organizational change and development procedures.

e. By the close of the second week of training, most groups requested specific packages of planned sequences to translate and transmit their new behaviors and skills to their site personnel.

f. There was again a balance of individual and team activities. At the conclusion of the workshop, most groups were better able to communicate their ideas to each other than when they arrived. Their reports to us indicated that we had legitimized their concern with real ideas and problems at their sites.

Evaluation of the Workshop Planning and Processes

The planning of the workshops was intended to meet the specific objectives listed in the first section of this report.

A. Progress was visible for all Educational Specialists in making them more competent in helping others implement and evaluate the curriculum and classroom management system. They reported feeling more comfortable in their roles. Those areas of skills they learned in the workshops at L.R.D.C. were transmitted at the sites.

B. The workshops demonstrated the type of planning and organization for individuals and groups that was expected in on-site training. Each person had an individualized program based on his needs. The program in both workshops was flexible enough to be changed each day if necessary. Each activity contained a built-in evaluation design. Site follow-up was provided to see if adequate transfer to the site had occured.

C. The Educational Specialists attending the workshops had responsibility for making choices about their own learning. These responsibilities were increased dramatically by the time of the second workshop. The site consultant helped the Educational Specialists develop evaluative tools to assess the level of their own performance. They were encouraged to use this data as the basis of their selection of training activities.

D. The first workshop included formal team building activities designed by the Center staff. The process of planning for the second workshop on site also included team activities. Many of the training activities planned and held in the second workshop were conducted with site teams. These were sometimes planned by the staff, but usually they were initiated by the site team.

In later on-site training with the Educational Specialists, a preliminary description of this process of planning the inservice workshops was the topic of a day long inservice session.

At first, the major problem in the minds of the Educational Specialists was their own perceived lack of the large number of staff resources that they had experienced at L.R.D.C. However, when they began to count the number of Educational Specialists at their site (3-4), their own project director (1), their L.R.D.C. consultant (1), the possibility of one outside L.R.D.C. consultant for specific experiences (1), the audio, video, and written materials which could be used before inservice training workshops, and, most of all, the use of teachers and aides from the site who held expertise in the various aspects of the curriculum or management system as leaders of various training sessions, they realized that their site had numerous resources. The problem was reduced to adequately identifying these resources and preplanning the use of them.

Two sites with the clearest vision of how this inservice training process worked produced their own sophisticated plans for individualized workshops. Both sites did more careful pre-planning with their individual participants than had been possible at L.R.D.C. Each participant knew weeks in advance the activities he would be engaged in during the workshop, and was able to do specific pre-study to take maximum advantage of the time during the inservice workshop.

The following suggestions for applications and adaptations of this process have been generated through over a year's use of it in training Educational Specialists, teachers, aides, and parents in L.R.D.C. Follow Through.

A. Inservice training should be planned to advance long range district and program goals.

B. Inservice training should be carefully planned with specific objectives for each activity.

C. Identification of entering competencies of all participants provides opportunities for the development staff to help each participant plan appropriate learning experiences for himself.

D. Inservice training should be evaluated, not only immediately but in terms of behavior change, over long periods of time.

E. Inservice training should be structured so that the responsibility for professional development shifts to the individual.

F. Inservice training should meet various types of objectives for a professional group -- morale building, skills development, attitude changing, materials and curriculum planning, etc.

G. Inservice training should include activities appropriate to the type of objective the activity is intended to meet.

H. High involvement activities will usually result in greater learning of specifics.

I. Social activities are an important part of morale building and group communication, and should be specifically planned for in the inservice training.

J. Involvement in the planning process should be as broad as is practicable from the earliest possible stage. Structure for the total inservice design should be provided by those who carry the total responsibility for the inservice training.

In some ways the L.R.D.C. Project Follow Through has distinct advantages over local school districts. Support personnel with clear role descriptions are built into the system. The expectation for substantial inservice training is built into the project. Clear teacher and aide roles are described and training, therefore, is easier to define. Long range goals of the system and individuals within it are clearly

established. Many school districts, however, are beginning to do this type of planning which develops long range goals. At the same time, they are beginning to buy the support personnel necessary to make those goals a reality. The experience this project has had demonstrates the feasibility of developing the skills necessary for such support personnel to use inservice training, integrated with ongoing supervision, to reach toward these goals.